Business Gateway Initiative

Advisory Group Meeting

FEBRUARY 2, 2005

Meeting Facilitator:
- Justin Van Epps   SBA

Knowledge Agent:
- Jiyoung Chung   PMO

Meeting Participants:
Justin Van Epps (SBA)
Karen Hogan (DOC)
James Hyler (DoEd)
Jeanne VanVlendren (DoEd)
Bill Burdett (DOJ)
Jeff Koch (DOL)
Steven Lott (DOT)
Laura Fox (SBA)
Cesar deGuzman (DOL)
Constance Downs (EPA)
Bruce Borzino (GSA)
Jack Stoute (HHS)
John Aguirre (HHS)
Kelly Wong (HUD)
Shivani Desai (OMB)
Nate Zuckerberg (GSA)
Tim Wang (OMB Portfolio Management)
Mardel Hall (PMO)
Jiyoung Chung (PMO)
George DelPrete (PMO)
Cameron Hogan (PMO)
Adjoa Cathcart (SBA)

Dial-in Participants:
Toby Henderson (DOE)
David Holyoke (SSA)
Stephanie Varvell (Coal Mining Vertical)

Meeting Location and Time:
SBA Eisenhower Conference Room, 1:00 – 3:00 PM

Meeting Notes:
- Justin Van Epps provided an introduction and reviewed the meeting agenda.

Meeting Agenda:
- Review process used in planning sessions
- Highlight agency attendance by planning session
- Review major activities planned for FY05, costs, and associated timelines

Meeting Objective: To summarize the achievements from the January 26 and 27 planning sessions.

Planning Meeting Process:
- Planning sessions were held for five BG project lanes: Content Management, Forms Catalog, Compliance Assistance, Harmonization, and Outreach
- The following agencies participated in at least one planning meeting:
  - HUD, DOT, Treasury, EPA, GSA, DOL, DOJ, DOC, DoEd, HHS, SBA

- Each group reviewed the latest list of planned project activities, and engaged in a discussion to identify additional activities for FY05
- The groups suggested organizing all activities into one of three major programmatic functions:
  - Planning, Operations, and Research and Outreach.
- After identifying activities, the group discussed high-level timelines for completion
- Summary notes were distributed to attendees for comment

Project Planning Meeting Re-cap:

High-Level Themes that Emerged during Planning Sessions

- Planning
  - The key to the planning component of the project is engaging the business community to validate and refine project direction and guide future investments.
  - Existing data, focus groups, and quantitative requirements analysis, etc., should be leveraged to understand what the business community needs are and how BG can address those needs.
- Operations
  - Integrate BG with related agency initiatives—rather than 'reinvent the wheel', BG will leverage initiatives already in place or in development
  - Break down agency siloes—BG aims to identify natural/ logical integration points to implement more compliance assistance tools and data harmonization projects, etc. in which multiple agencies have a stake
  - Improve usability of existing products
- Research and Outreach
  - Leverage existing channels to educate customers—agencies are already conducting this kind of research, and BG wants to leverage that
  - Evaluate new channels—industry associations, etc.

For detailed planning session outcomes by project area—portal, forms catalog, data harmonization, compliance assistance, and research and outreach, please refer to the meeting PowerPoint presentation.

Summaries of discussions and recommendations regarding each project area, as well as for overall BG project management, are below.

General Discussion and Recommendations for Business Gateway

ROI and Funds Appropriations
AG Question/ Concern: AG expressed the concern that BG benefits to agencies are still unclear, and that it's a challenge to up- and down-sell the investment to agencies, when agencies' already stretched budgets would be squeezed further to fund the Gateway. On a related note, the AG inquired whether funds need to be used in a given year.

PMO Response: OMB stated that BG's vision has always been straightforward, to create a basic one-stop-shop that most developed countries have that the U.S. was lacking. The clear benefit is to both the business community and agencies in reduced burden and increased efficiency in B2G interactions, as outlined in the Exhibit 300. Funds can be appropriated as two-year, one-year, or no-year funds; two-year and no-year funds will help provide flexibility for BG spending.

More Detailed Business Case
AG Question/ Concern: Advisory Group members suggested that the Business Gateway PMO provide a more detailed business case. While a business case is detailed in the OMB Exhibit 300, Advisory Group members feel it lacks evidence of cost savings, especially regarding cost

savings to agencies. These numbers must be substantiated (i.e., with greater detail, calculations, data source). Recommendations included rolling up a more detailed project plan into next year's Exhibit 300.

PMO Response: There is, indeed, reliable data behind those cost savings, and PMO will present the data and calculations.

Increased Accountability
AG Question/ Concern: The Advisory Group expressed a desire for more transparency regarding project management and to see a detailed project with specific activities, costs, time-frames, and milestones associated with them. AG would also like to see the most recent OMB scorecard for BG. AG members support BG's direction, and these two items will help 'sell' the initiative to their agencies and obtain buy-in and funding commitments.

PMO Response: BG PMO will provide these two documents.

Vision/ Linkages between Projects
AG Question/ Concern: Another useful document to see to better understand BG's goals and progress toward those goals is a map outlining linkages between different project areas. A better laid out vision will enable agencies to help guide project spending.

PMO Response: PMO will lay out the BG vision, linking all project areas, more clearly.

Project-Specific Discussion and Recommendations

Portal/ Content Management: 'Next Level of Detail'
AG Question/ Concern: Advisory Group members expressed the opinion that planning sessions were time well spent, but one main concern emerged regarding the need to progress to/ tighten the next level of detail.
- How are activities aligned with budget requirements? Given the current level of detail in the presented budget, is BG ready to invest $8 million in FY05?
- What is the actual/ proper sequencing of activities? (E.g., agency CMSs don't talk to each other, so a requirements analysis with stakeholder agencies to identify architectural issues must occur *after* define needs of business community; and *before* tool assessment is conducted.)

PMO Response: BG will conduct subsequent small working groups to detail and tighten costs and time-frames. BG is, in fact, ready to invest $8 million in FY05 investments, which are scoped down from original $15 million investment to most critical target areas.

Forms Catalog: Re-scoping
AG Question/ Concern: The following should be added to the forms catalog FY05 activity list:
- What belongs in the catalog, and what should be removed (i.e., forms for citizens rather than businesses, single-use forms)
- Link to related e-Gov sites and define form ownership when a form is located on another e-Gov site (i.e., grants.gov)
- Solution to the problem of multiple entry points to forms.gov (i.e., provide orienting text to guide users from all entry points)

PMO Response: PMO will update the activity sheet to reflect these additional issues to address.

Forms Catalog: Cost Clarification
AG Question/ Concern: The Advisory Group requested clarification around the $1.5 million—what on this list costs this much money?

PMO Response: The cost includes support costs, hosting costs, maintenance and other operational costs, migration of forms from other sites, etc. Currently, 39 agency forms are included totaling ~4300 forms, and enhancements to the catalog are in progress. PMO will provide a more detailed break-down.

Compliance Assistance: SBPRA
AG Question/ Concern: The Advisory Group asked whether the Small Business Paper Reduction Act (SBPRA) ties into BS objectives.

PMO Response: Business Gateway will indeed help agencies comply with SBPRA requirements.

Data Harmonization: Process
AG Question/ Concern: Data collection must have an OMB approval number when multiple agencies are owners of a single form. What agency is responsible for the burden hours in the case of data harmonization and shared forms?

PMO Response: The Coal Mining Vertical and Grants.gov are working through this very issue, revealing a key lesson learned regarding the data harmonization business process: agencies and their partners can make their own burden hours arrangement to resolve this issue.

Research and Outreach: Shared Cost and Budget Flexibility
AG Question/ Concern: In federal government, marketing dollars are scarce, and large amounts are unjustified because the government can't turn those marketing dollars into profit. The $2 million research and outreach cost must be broken down to provide more detail.

PMO Response: OMB emphasized the shared-cost nature of the expenditure; while the $2 million is a large amount, it is better to spend it once to research needs from across the business community—that are the same stakeholders of different agencies—than to spend smaller, agency-specific dollars to conduct redundant research.

In addition, OMB presented the option of making the BG budget more flexible; unspent dollars could be rolled over, returned to agencies, or shifted money across BG project areas depending on need (e.g., shift Research and Outreach dollars to Compliance Assistance).

Overview of February 9th Governance Board Meeting:
Justin explained that there will be two decisions to move forward:
COMPASS/ Compliance Assistance tool—to fund requirements analysis
Coal Vertical/ Data Harmonization—to fund system production

Justin clarified that the funding would come from FY05 money (there is very little carryover from FY04). Governance Board meeting materials will be sent out Friday

AG Recommendations: The Advisory Group recommended that cost details be included in the COMPASS and Coal Vertical presentations. What impact does going forward/ not going forward have on the rest of the compliance and harmonization budget? A concern that Coal Vertical does not offer clear cross-agency benefits was expressed, as was the opinion that data harmonization by nature is an incremental process involving a few agencies at a time and that if BG finds ten successful projects like Coal Vertical, it would be a tremendous win for the initiative.

Project Direction:
• Governance Board meeting Wednesday, February 9th 1-3 p.m. at the GSA.

Action Items/Next Steps:

#	Key Tasks	Owner	Time-frame
	**Action Item List**		

#	Key Tasks	Owner	Time-frame
1	Distribute project tracking brief with the next level of detail around budget to AG	PMO	By next week
2	Distribute last OMB scorecard to AG	OMB	This week
3	Distribute newsletter	PMO	Q2
4	Continue small working groups—schedule follow-up meetings	PMO	Next couple weeks
5	Conduct regular monthly meetings—to give update on progress against activities/ project plan	PMO	Ongoing
6	Add forms catalog re-scoping activities to activity list	PMO	This week
7	Revise COMPASS and Coal Vertical presentations to include/ highlight costs, impact, and agency benefits	PMO	Before Feb 9 Gov Board meeting